

CULC SURVIVAL GUIDE 2025

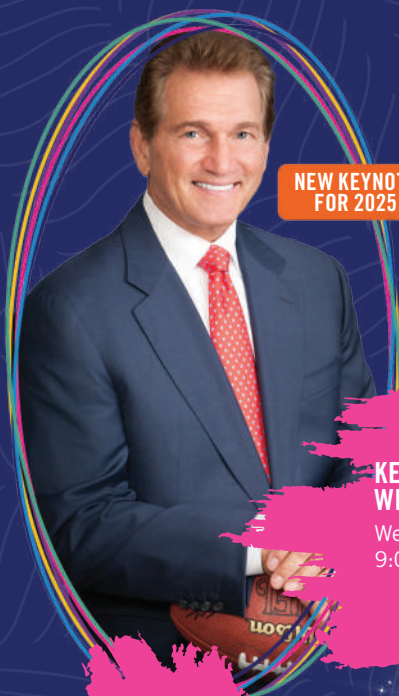


LEADERSHIP
CONVENTION

AUGUST 12-15 2025, CAESARS PALACE

Las Vegas

**DISCOVER.
EXPERIENCE.
GROW.**



**NEW KEYNOTE
FOR 2025**

**KEYNOTE ADDRESS
WITH JOE THEISMANN**

Wednesday, August 13, 2025
9:00 - 9:45 AM

**OPENING-NIGHT
RECEPTION FEATURING:
THE MENTALIST FREDERIC
DA SILVA**

Wednesday, August 13, 2025
7:30 - 8:30 PM



KASASA

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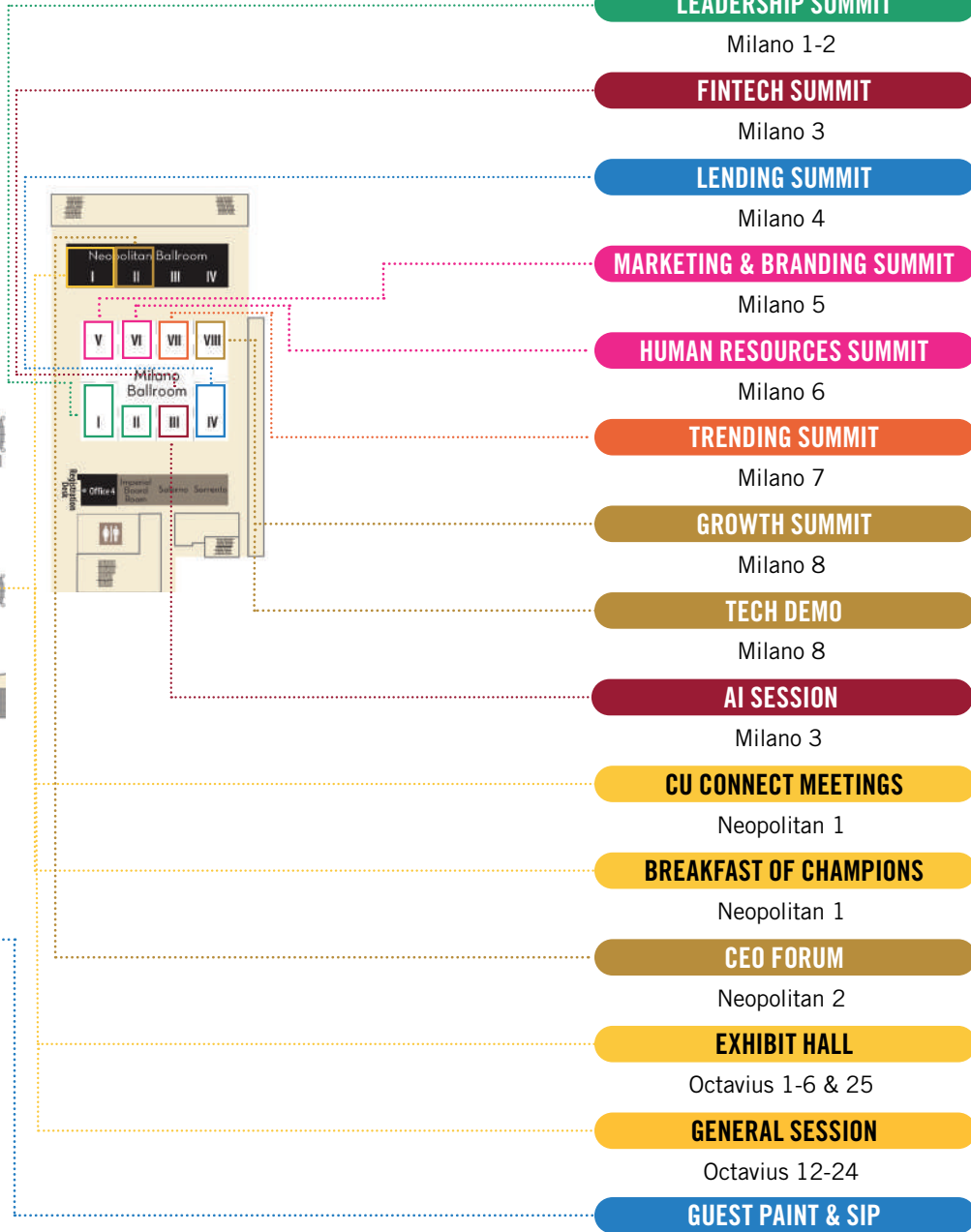
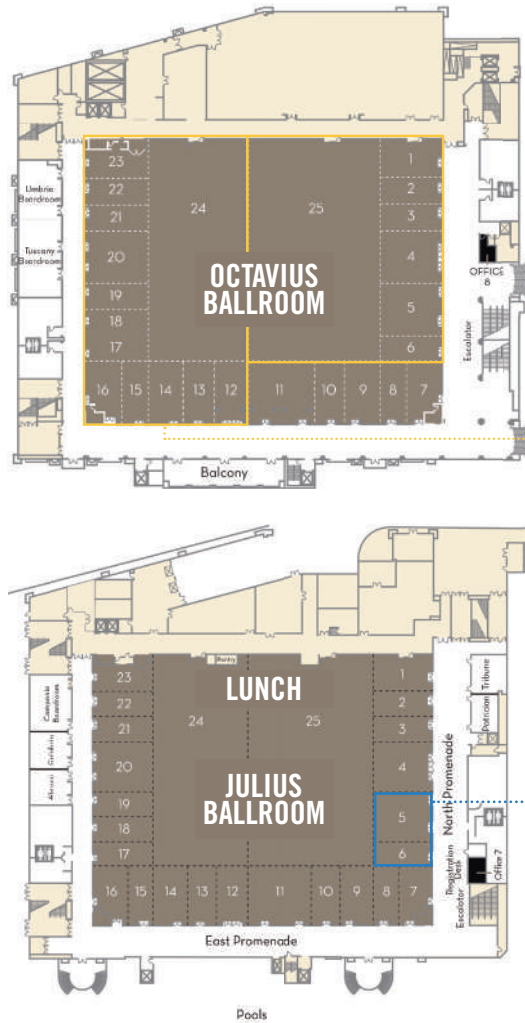
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 **WIFI**

NETWORK: CAESARS_RESORTS

CAESAR'S PALACE MAP



LEADERSHIP SUMMIT

Milano 1-2

FINTECH SUMMIT

Milano 3

LENDING SUMMIT

Milano 4

MARKETING & BRANDING SUMMIT

Milano 5

HUMAN RESOURCES SUMMIT

Milano 6

TRENDING SUMMIT

Milano 7

GROWTH SUMMIT

Milano 8

TECH DEMO

Milano 8

AI SESSION

Milano 3

CU CONNECT MEETINGS

Neapolitan 1

BREAKFAST OF CHAMPIONS

Neapolitan 1

CEO FORUM

Neapolitan 2

EXHIBIT HALL

Octavius 1-6 & 25

GENERAL SESSION

Octavius 12-24

GUEST PAINT & SIP

Julius 5&6

CAESAR'S PALACE MAP

PRE-CONFERENCE WORKSHOPS

Hot Topic #1

Mergers & Acquisitions -
Strategic Considerations for
Member Focused CUs

Milano 6

Hot Topic #2

Staying on Strategy: Applying
Your Strategic Plan Into
Your Operations and Culture

Milano 7

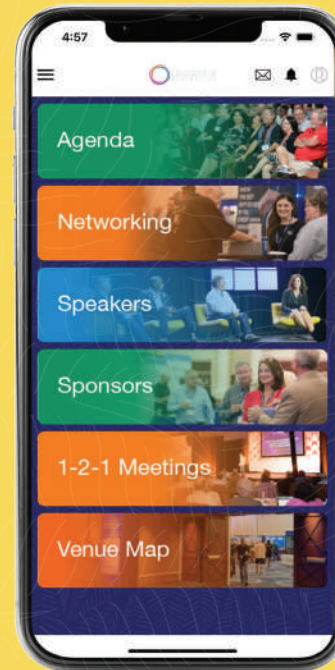
Hot Topic #3

Governance: Leadership
Strategies for Directors in
a New Era of Banking

Milano 8



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Download our event app to get the most up-to-date information on the agenda, speakers and more! It's easy!

Search "CU Leadership Convention 2025" in your app store to download the conference app with features the full agenda, speaker information and the opportunity to message other attendees. Refer to the login information email sent to you via email from PEI Media for your login key, Visit us at the registration desk for any questions or assistance.



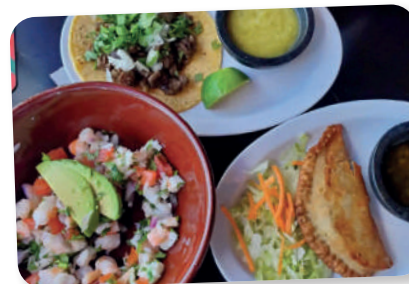
WEDNESDAY, AUGUST 13, 2025 - 7:30 PM THE MENTALIST

Award Winning Mentalist Frederic Da Silva is performing his mind reading magic show, Paranormal, at the CU Leadership Convention! Be prepared for an evening of mystery, magic, and hypnosis as Frederic delivers a mind-bending, unforgettable evening.

Voted Best Mentalist in Europe and ranked as the #1 Magic Show in Las Vegas, Frederic's jaw-dropping mind reading, elegant humor, and unique charm promise an unforgettable performance. Witness the magic and see why audiences around the world are left questioning reality!

Attendance limited to registered Delegates and registered Guests

THURSDAY, AUGUST 14, 2025 GUEST EXPERIENCE PACKAGES



**12:00 - 4:00 PM
ARTS DISTRICT
FOOD TOUR**

ARTS DISTRICT FOOD TOUR

Explore the vibrant Las Vegas Arts District—the city's hottest up-and-coming neighborhood! Embark on a casual walking food tour and sample delicious bites from several of the area's most popular restaurants. Along the way, you'll also discover local hangout spots and cultural attractions that give the Arts District its unique flavor. Guided by longtime locals in a small group setting, this experience offers an insider's look at what it's really like to live in Las Vegas. It's the perfect blend of food, culture, and community—designed to give you an authentic taste of local life.

Meeting location: Colosseum Entrance

**1:00 - 4:00 PM
PAINT & SIP**



PAINT AND SIP

Join Paint the Town and fellow CULC guests for a lively afternoon of creativity, wine, and refreshments! Attendees can choose to paint a set of four coasters or four mini canvases, with all materials provided. Paint the Town offers a safe, fun, and collaborative environment where guests are encouraged to take creative risks, share their stories, and explore their interests through art. Professional artists will guide you step-by-step through a two-hour class, making the painting process simple, relaxed, and enjoyable. You might be surprised by what you can create with your hands—and a little imagination!

Julius 5&6

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CU EVOLUTION

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Investment R/E
MBL Loans

Commercial R/E
Construction R/E

WHAT WE DO:



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evolve your credit union!



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www.cu-evo.com

AGENDA AT-A-GLANCE

Full agenda schedule can be found on the CU Leadership Convention 2025 App

TUESDAY, 12TH OF AUGUST, 2025



Registration - Promenade Level	11:00 am - 5:00pm
Pre-Conference Workshops	1:00 - 4:00pm
Deep Dive Hot Topic Workshop #1 Mergers & Acquisitions - Strategic Considerations for Member Focused CUs, Pete Duffy, Managing Director of Merger Advisory Services, SRM, Milano 6	1:00 - 4:00pm
Deep Dive Hot Topic Workshop #2 Staying on Strategy: Applying Your Strategic Plan Into Your Operations and Culture, John Jancloes, Founder & CEO, The CEO Corner, Milano 7	1:00 - 4:00pm
Deep Dive Hot Topic Workshop #3 Governance: Leadership Strategies for Directors in a New Era of Banking, Tim Harrington, President, TEAM Resources, Milano 8	1:00 - 4:00pm

DAY 1

WEDNESDAY, 13TH OF AUGUST, 2025



Registration - Promenade Level	7:00 am - 5:00pm
Exhibit Hall Grand Opening & Continental Breakfast	7:00 - 8:45am
Opening Keynote Joe Theismann The Challenge of Change	9:00 - 9:45am
Hot Topics Panel Are We Living in Perilous Times? Tax-Exemption Status, Regulatory Changes & Industry Outlook Geoff Bacino, Partner, Bacino & Associates; Jason Stverak, Chief Advocacy Officer, Defense Credit Union Council	9:45 - 10:30am
5x5: 5 Speakers share their one best strategy that will have the biggest impact on CUs in just 5 minutes or less Samuel Jones, PhD, Founder, Transform Now, Inc.; Tim Harrington; Matt Maguy and Jim Pond, Co-Founders, James x Matthew, JXM; Renee Sattiewhite, President & CEO, AACUC	10:30 - 11:00am
Networking Break in Exhibit Hall	11:00 - 11:45am
Luncheon - Julius Ballroom	11:45 am - 12:45pm
Networking/Dessert in Exhibit Hall	12:45 - 1:15pm

Leadership Summit - The Modern Credit Union Leader: What It Takes to Win with Marketing in 2025 Ben Udell, SVP Product Marketing & Innovation, Marquis, Sponsored by Marquis	1:15 - 1:40pm Milano 1-2
Marketing & Branding Summit - Open a Can of Whoop Ads: Practical Steps to Grab Attention & Deliver a Killer ROI Matt Maguy and Jim Pond	Milano 3
FinTech Summit - Turn Member Financial Wellness Into Your Growth Engine, Mike Duncan, CEO, Bankjoy Sponsored by Bankjoy	Milano 4
Lending Summit - Practical, yet innovative strategies to leverage human connection and boost loan growth, Jed Meyer	Milano 5
HR Summit - Top Strategies for Effective Succession Planning in the C-Suite, Tamra Gaines - Session repeats at 1:50 pm	Milano 6
Trending Summit - Succession Planning: How to Craft a Plan that Supports Your CU's 5-Year Strategy, Paul Dionne	Milano 7
Growth Summit - Mastering Uncertainty: Grow Deposits, NII, and Loyalty in Any Environment, Gabe Krajicek - Sponsored by Kasasa	Milano 8
Transitional Break	1:40 - 1:50pm
Leadership Summit - Fintech Partnerships - How CUs Can Gain a Competitive Advantage to Acquire More Members & More Loans, Tim Harrington	1:50 - 2:20pm
Marketing & Branding Summit - What makes your CU Unapologetically Unique? Andrew Downin, Session repeats at 2:30 pm	
Fintech Summit - Fintech Partnerships: A Blueprint for Credit Union Success, Nick Evens, Adam DeVita	
Lending Summit - Go small to go BIG! How CUs are growing loan portfolios with niche marketing, Maria Martinez	
HR Summit - Top Strategies for Effective Succession Planning in the C-Suite, Tamra Gaines	
Trending Summit - Top Cybersecurity Challenges Facing CUs Today & How to Respond, John Iannarelli, Dawn Goldbacher	
Growth Summit - M&A Panel Discussion: A No-Holds Barred Conversation about the Good, the Bad and the Ugly, Peter Duffy, Mark Lovewell, Jared Freeman	
Transitional Break	2:20 - 2:30pm

Leadership Summit - Momentum Now: A Proven System to Lead with Confidence in Your Credit Union, Dr Samuel Jones	2:30 - 3:00pm
Marketing & Branding Summit - What makes your CU Unapologetically Unique? Andrew Downin	
FinTech Summit - Leverage the Power of AI to Gain Valuable Member Insights – Unavailable Until Now! Steve Bone	
Lending Summit - Leveraging Data Analytics to Grow Your Loan Portfolio, Armand Parvazi	
HR Summit - The Neuroscience of Leadership: Empowering Employees to Thrive, Sandra McDowell	
Trending Summit - Building a High-Trust, Member-Centric Culture, Lynn Heckler	
Growth Summit - Reaching the "Unreachable": How to Grow by Appealing to Millennials and Gen Z'ers, Bill Butler, Deena Otto	
Happy Hour in Exhibit Hall	3:00 - 4:00pm
Opening Night Entertainment: The Mentalist (doors open at 7:00 pm) - Octavius Ballroom	7:30 - 8:30pm

DAY 2

THURSDAY, 14TH OF AUGUST, 2025

Breakfast of Champions	7:30 am - 8:45am Neopolitan 1
Exhibit Hall Opening & Continental Breakfast	7:30 - 9:00 am
Keynote Address - What AI Can Do -- and Can't Janelle Shane, AI Speaker & Humorist	9:00 - 9:40am
Keynote - The Connection Quotient: Elevating the Industry Experts to A Leadership Powerhouse, James Pogue, PhD, CEO, JP Enterprises	9:40 - 10:20am
2025 Neoteric Changemaker Award Ceremony	10:20 - 10:30am
Transitional Break	10:30 - 10:45am
CXO Summit Resume	10:45 - 11:15am
Leadership Summit - Suits and Skirts – Game On! Teresa Freeborn	
Marketing & Branding Summit - Building Brand Loyalty Through Financial Literacy and Community Impact, Larry Dunn	
AI Summit - AI in the Contact Center: The Change You Can't Ignore Jake Tyler, AI Strategy Leader, Glia - Sponsored by Glia	Milano 3

DAY 2

THURSDAY, 14TH OF AUGUST, 2025



Lending Summit - Practical AI: 5 Real-Use Solutions You Can Put to Work Right Away Maurice Jourdain-Earl	
HR Summit - The Serious Business of Happiness: Proven Principles for High Performance Jackson Kerchis	
Trending Summit - The Triple Win: A People-First Approach to CU Mergers Dan Stoltz	
Tech Demo - The Loan Feature that Changes the Game – for You and Your Borrowers Gabe Krajicek, CEO, Kasasa - Sponsored by Kasasa	Milano 8
CU Connect - The Land Mines of Executive Benefits: What You Don't Know CAN Hurt You! Maria Kell & Tyler Moore, Co-Founders, Kellmoore & Associates - Sponsored by Kellmoore & Associates	10:45 - 12:30pm Neopolitan 1
CEO Forum: AI in Action - Unlocking Efficiency, Innovation & Growth for Credit Unions Vishal Madhavan, Managing Director & Partner, Boston Consulting Group - Sponsored by Earnest Consulting Group	10:45 - 12:30pm Neopolitan 2
Networking Break in Exhibit Hall	11:15 - 11:45am
Leadership Summit - How Internal Talent Mobility Creates Long-Term Leadership Excellence, Danielle Scodellaro, Sr. Executive Benefits Specialist, TruStage - Sponsored by TruStage	11:45 - 12:30pm
Marketing & Branding Summit - Marketing your CU in the Joyful and Dark Moments in Your Members' Lives, Tansley Stearns	
AI Summit - From Buzz to Benefit: A Practical Path to AI for Credit Union Leaders Mitch Rutledge, Co-Founder and CEO, Vertice AI - Sponsored by Vizo Financial	
Lending Summit - Bridging Gaps: Empowering Communities with Non-Prime Auto Lending Solutions, Tyler Valentine	
HR Summit - From Managers to Leaders: Enhancing Employee Experience Through Technology, Rob Hoyle	
Trending Summit - Latest Threat Actor Trends & Your Most Important Security Control, Heath Renfrow, Co-Founder & Chief Information Security Officer - Sponsored by Fenix24	
Financial Summit - Re-thinking the Bottomline at "Small" CUs, Samantha Paxson (moderator), Chris Imperatrice, Rick Boothby	

CEO Forum: AI in Action - Unlocking Efficiency, Innovation & Growth for Credit Unions (cont), Vishal Madhavan, Managing Director & Partner, Boston Consulting Group - Sponsored by Earnest Consulting Group	11:45 - 12:30pm
Luncheon	12:30 - 1:15pm
Networking Break in Exhibit Hall & Exhibit Hall Finale	1:15 - 2:00pm
Arts District Food Tour	12:30 - 4:00pm
Paint and Sip	1:00 - 4:00pm
Leadership Summit — The Parternship Advantage: How Strategic Partnerships Can Revitalize Your CU, John Janclaes	1:45 - 2:15pm
Marketing & Branding Summit - Re-branding: Effective Practices to Reinvent Your CU in a Dynamic Market, Steph Sherrodd	
AI Summit - Practical AI: 5 Real-Use Solutions You Can Put to Work Right Away, Josh DeTar, EVP - Evangelism, Sponsored by Tyfone	
Lending Summit - Discover How to Fuel Loan Growth & Minimize Risk with AI (session repeats at 2:30), Samantha Hubbard	
HR Summit - Employee engagement: Your secret weapon to give your CU a competitive advantage Brian Waldron	
Trending Summit - Catering to Niche Markets: How One CU Serves Members and Families with Dementia Brian Lee	
Financial Summit - Prepare for Continued Regulatory Scrutiny of Liquidity Management, Alec Hollis	
Transitional Break	2:15 - 2:30pm

DAY 2

THURSDAY, 14TH OF AUGUST, 2025



Leadership Summit - Best Practices for Effective CEO - Board Relationships, Susan Mitchell, Harold Roundtree, Chung Bothwell	2:30 - 3:00pm
Marketing & Branding Summit - Break Free from Collaboration Chaos: Reimagine Strategically-Aligned Teamwork for Marketing Success, Dohnia Dorman	
AI Summit - Beyond the AI Hype: Building the Credit Unions of Tomorrow, Lisa Arthur	
Lending Summit - Discover How to Fuel Loan Growth & Minimize Risk with AI, Samantha Hubbard	
HR Summit - Succession Planning: Best Practices for Building Leaders and Developing Engagement Among Employees, Val Mindak	
Trending Summit - Growth By Focusing on Community: Real World Tactics Every CU Should Know, Jim Morrell	
Financial Summit - Why you should only pay for performance... and what exactly is "performance?", John Moreno	

DAY 3

FRIDAY, 15TH OF AUGUST, 2025



Buffet Breakfast	7:30 - 9:00am
Underground Collision: Underground: What Makes You Want to CUSS? AI, Growth, Tech, People Brandi Stankovic (moderator), Principal, Strategic Advisory, Michael Maxwell, Chair, Rize CU; Lisa Arthur, Senior Vice President, Sensedia; Scott Prior, CEO, Connection CU	9:00 - 9:45am
2-Minute Spotlight: 4 Speakers Have Just 2 Minutes to Deliver their Most Powerful Idea for CUs Today Tansley Stearns, President & CEO, Community Financial CU; Brandi Stankovic, Principal, Strategic Advisory; Sandra McDowell, MA. PCC, CEO, eLeadership Academy; Brian Waldron, CEO, Dort Financial CU	9:45 - 10:00am
General Session with Closing Keynote: Resilience in Times of Uncertainty Milton Hunt, Founder, Miltonhunt.net	10:00 - 11:00am
Conference Adjourns	11:00am

DAY 1

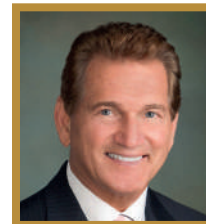
WEDNESDAY, AUGUST 13, 2025

Opening Keynote

9:00 - 9:45 AM

Keynote Presentation: The Challenge of Change

JOE THEISMANN



Drawing from personal experience, Joe Theismann knows how to deal with the Challenge of Change. On November 18, 1985, he was on top of his game -a two-time Pro Bowl player and the most productive quarterback in the history of the Washington Redskins. Later that evening, he found himself in a hospital bed with a compound fracture to his leg, shattering both his career and his boyhood dream. At age thirty-five, he was faced with starting over his personal life and professional career. In this stirring presentation, individuals and organizations learn how to tackle change by keeping a positive mental outlook and committing to a vision that guides you to the top.

Growth Summit

1:15PM

Mastering Uncertainty: Grow Deposits, NII, and Loyalty in Any Environment

Sponsored by:

GABE KRAJICEK, CEO, KASASA

KASASA

Uncertainty is the new normal but it doesn't have to stall your growth. In this session, Kasasa CEO Gabe Krajicek shares proven strategies that help community financial institutions thrive in any market. Learn how to lower deposit costs, improve NII, and build deeper consumer loyalty without disruptive overhauls. Backed by real-world examples, this conversation will challenge conventional thinking and equip you with practical tools to turn margin pressure and market volatility into long-term growth. Walk away ready to lead with confidence – no matter what the market throws at you.

DAY 1

WEDNESDAY, AUGUST 13, 2025



Leadership Summit

1:15 - 1:40 PM

The Modern Credit Union Leader: What It Takes to Win with Marketing in 2025

BEN UDELL, SVP Product Marketing & Innovation, Marquis

Sponsored by:

marquis



Ever feel like you're pouring time, talent, and budget into marketing...but not seeing anything measurable across your credit union? Winning in 2025 requires more than great creative, fresh direct mail, and one team trying to drive growth, it demands measurable, accountable marketing that everyone in your credit union understands and supports. The modern credit union leader influences and engages in more than his or her own department. They bridge departments, wrangle data, build trust, and most of all they eliminate the data black hole by leading with clarity, metrics, and intention. Great results, and growth for

your credit union, come from more than just your marketing team. It's an organizational focus where everyone is accountable. We'll explore insights and stories from the front lines of marketing and data, giving all leaders actionable ideas they can implement today to power their growth through 2025 and beyond.

Fintech Summit

1:15 - 1:40 PM

Turn Member Financial Wellness Into Your Growth Engine

MIKE DUNCAN, CEO, Bankjoy

Sponsored by:

Bankjoy



Credit unions were founded to serve communities, but big banks are winning the digital satisfaction race. Bankjoy CEO Mike Duncan reveals how gamification can help credit unions reclaim their competitive advantage by bringing their unique "people-helping-people" mission into the digital banking age. In this session, discover how to:

- Bridge the personalization gap: 72% say personalization affects banking choices, yet big banks aren't delivering the tools members want
- Capture unmet demand: 88% of Gen Z/Millennials want financial education while 40% of consumers lack basic financial literacy
- Turn engagement into growth: Members using financial wellness tools generate valuable data for targeted cross-selling opportunities
- Create financial partnerships that differentiate you from big banks and drive sustainable growth

DAY 2

THURSDAY, AUGUST 14, 2025

Keynote Session

9:00 - 9:40 AM

What AI Can Do -- and Can't

JANELLE SHANE, ARTIFICIAL INTELLIGENCE SPEAKER, HUMORIST

AI is making headlines and disrupting banking. But what IS artificial intelligence, and what is it good at? AI expert Janelle Shane takes a weird and humorous approach to a complex topic and talks about the kinds of problems where AI will succeed, fail, or succeed at solving the wrong problem entirely. She has been featured on the main TED stage, in the New York Times, The Atlantic, WIRED, Popular Science, All Things Considered, Science Friday, and Marketplace, as well as being Futurist in Residence at the Smithsonian. Her book, "You Look Like a Thing and I Love You: How AI Works, Thinks, and Why It's Making the World a Weirder Place" uses cartoons and humorous pop-culture experiments to look inside the minds of the algorithms that run our world, making artificial intelligence and machine learning both accessible and entertaining. Shane was named one of Fast Company's 100 Most Creative People in Business, and an Adweek Young Influential.

Keynote Session

9:40-10:20AM

The Connection Quotient: Elevating the Industry Experts to A Leadership Powerhouse

JAMES POGUE, PHD, CEO, JP ENTERPRISES

In many credit unions, leaders are often promoted for their technical expertise, with the expectation that their leadership abilities will evolve. While this can be the case for some, for others, the transition to effective leadership doesn't always happen naturally. So, what happens when disruption strikes? When change accelerates into full-scale chaos? Leaders who lack practiced leadership skills in key organizational areas often manage teams that are disengaged, less productive, and ultimately less profitable.

In this session, we will explore proven strategies that enable leaders to identify and address their leadership gaps. Attendees will engage with The Connection Quotient, a sophisticated assessment tool designed to help leaders build stronger teams, drive deeper engagement, and cultivate a thriving organizational culture.

This session will underscore the importance of having a clear, actionable roadmap to elevate industry experts into true leadership powerhouses. Participants will leave with practical insights and tools to transform leadership potential into impactful, sustainable success.

Unleash your Virtual Workforce



Get the leading AI for Credit Union Contact Centers



Learn from AI Strategist Jake Tyler in a Breakout:

"AI in The Contact Center: The Change You Can't Ignore"

Thu, Aug 14 - 10:45 am - 11:15 am PT

Missed the session? Stop by **Booth #1523**

Tech Demo

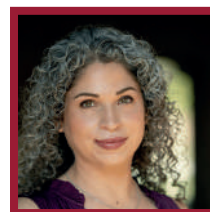
10:45 -11:15 AM

The Loan Feature that Changes the Game – for You and Your Borrowers

Sponsored by:

VENNESA VALCORAZÃO, KASASA PRESIDENT

KASASA



Today's borrowers expect flexibility. Tomorrow's growth depends on delivering it, without sacrificing control or margins. In this live demo, Kasasa President Vennesa Valcorazão will introduce the Take-Back® Loan: a transformative lending feature that lets members pay ahead while keeping access to their money. More than a feature, it's a strategy – one that helps credit unions compete on value, not just rate. The Take-Back® Loan integrates with your existing systems and loans already on your books, enabling you to grow deposits, deepen engagement, and stand apart in a crowded and competitive market.

DAY 2

THURSDAY, AUGUST 14, 2025

AI Summit

10:45 - 11:15 AM

AI in the Contact Center: The Change You Can't Ignore

JAKE TYLER, AI STRATEGY LEADER, GLIA



AI in the Contact Center: The Change You Can't Ignore
Forget incremental gains—AI is the next seismic platform shift reshaping credit unions. As Voice AI achieves human-level parity, its impact on contact centers will be dramatic. We'll cut to the chase on what it means if AI can perform 30-50% of current front-line tasks. Discover what's working: how credit unions are leveraging AI as "virtual labor" to automate 30-50%+ of interactions, elevate human teams, and unlock unprecedented efficiency. Get the unvarnished truth, real success stories, and

the playbook to transform your contact center now.

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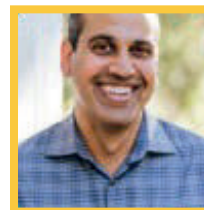
CEO Forum

10:45 AM - 12:30 PM

CEO Forum: AI in Action - Unlocking Efficiency, Innovation & Growth for Credit Unions

VISHAL MADHAVAN, MANAGING DIRECTOR & PARTNER, BOSTON CONSULTING GROUP

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Artificial Intelligence (AI) is no longer just a future concept—it's a present-day catalyst transforming financial services. This dynamic, executive-level session is designed specifically for credit union CEOs to explore how AI is being applied across the financial services sector—from major breakthroughs in customer engagement to back-end efficiencies that are redefining productivity. Learn where the real ROI is being found today, and how credit unions of all sizes can harness AI to compete, innovate, and thrive.

What to Expect:

- **Industry Snapshot:** Get a concise overview of the current state of AI in banking and adjacent industries, with a focus on real-world success stories and trends driving measurable impact.
- **Tactical Use Cases:** Explore practical applications of AI in credit unions—automating member support, streamlining marketing workflows, enhancing risk management, and optimizing internal operations.
- **Peer Collaboration:** Participate in interactive discussions with fellow executives on how they're experimenting with or implementing AI, and share lessons learned on overcoming common roadblocks such as talent gaps, data silos, and regulatory concerns.
- **Visionary Workshop:** Roll up your sleeves in a guided workshop session to map out an "art of the possible" AI-powered customer journey—from onboarding to retention—designed to inspire new thinking around product innovation and service delivery.

Whether you're just beginning to explore AI or looking to deepen your strategy, this session will equip you with the knowledge, inspiration, and peer insight to turn insights into action.

CU Connect

10:45 AM - 12:30 PM

The Land Mines of Executive Benefits: What You Don't Know CAN Hurt You!

MARIA KELL & TYLER MOORE, CO-FOUNDERS, KELLMOORE & ASSOCIATES



This session will explore the hidden risks in executive benefit plans including the perils of volatility as retirement approaches, the hazards of bad poor plan design, and the danger of no exit strategy.

Speakers: Maria Kell, Principal, and Tyler Moore, Principal, KellMoore & Associates



Note: This session is invitation-only and seating is limited. If interested, please contact our convention staff about availability.

Sponsored by:



DAY 2

THURSDAY, AUGUST 14, 2025

Leadership Summit

11:45 AM - 12:30 PM

How Internal Talent Mobility Creates Long-Term Leadership Excellence

Sponsored by:



DANIELLE SCODELLARO, SR. EXECUTIVE
BENEFITS SPECIALIST, TRUSTAGE



Research shows that a culture of “internal mobility” can help employers develop and retain better leaders who drive growth. This session will help your credit union break out of a top-down pyramid-shaped succession plan, and create a program that engages, retains, and develops your best talent.

AI Summit

11:45 AM - 12:30 PM

From Buzz to Benefit: A Practical Path to AI for Credit Union Leaders

Sponsored by:



MITCH RUTLEDGE, CO-FOUNDER AND CEO,
VERTICE AI



Artificial Intelligence isn't just the future—it's already quietly powering decisions, processes, and member experiences in credit unions today. This engaging session will cut through the AI hype to provide clarity on what AI actually means for your credit union. Through a simple, actionable framework, we'll explore how to evaluate AI technologies, identify no-regret opportunities for immediate impact, and build a confident strategy for adoption. You'll walk away understanding not just how AI works, but how to align it with your mission, governance, and member experience. Whether you're skeptical, curious, or already experimenting—this session will help you lead with confidence in a rapidly evolving landscape.



AI Summit

1:45 pm - 2:15 PM

Practical AI: 5 Real-Use Solutions You Can Put to Work Right Away

Sponsored by:



JOSH DETAR, EVP - EVANGELISM, TYFONE

Artificial Intelligence isn't just the future—it's already quietly powering decisions, processes, and member experiences in credit unions today. This engaging session will cut through the AI hype to provide clarity on what AI actually means for your credit union. Through a simple, actionable framework, we'll explore how to evaluate AI technologies, identify no-regret opportunities for immediate impact, and build a confident strategy for adoption. You'll walk away understanding not just how AI works, but how to align it with your mission, governance, and member experience. Whether you're skeptical, curious, or already experimenting—this session will help you lead with confidence in a rapidly evolving landscape.

DAY 2

THURSDAY, AUGUST 14, 2025

Trending Summit

11:45 AM - 12:30 PM

Latest Threat Actor Trends & Your Most Important Security Control

HEATH RENFROW, CO-FOUNDER & CHIEF
INFORMATION SECURITY OFFICER



In today's cyber landscape, where threats are constantly evolving, one of the most vital yet overlooked controls is ensuring that you have immutable and tested backups with real Recovery Time Objectives (RTOs). While many organizations focus on perimeter defenses, firewalls, and threat detection systems, they often underestimate the importance of a backup strategy that can be trusted under the harshest conditions.

Threat actors are becoming more sophisticated. They are not just focusing on breaching your defenses but are also targeting and destroying backup systems, leaving organizations vulnerable to extended downtime and irreversible data loss. We've seen an uptick in attacks where ransomware groups and nation-state actors aim to lock up critical data and render backup systems useless, forcing victims into tough situations. As these attacks continue to increase in both frequency and severity, businesses without a robust backup strategy face a serious risk of falling victim to cyber incidents that can take weeks or even months to recover from.

The key to surviving these attacks is not just having backups in place but ensuring they are immutable, meaning they cannot be altered or deleted by unauthorized users, including attackers. Furthermore, these backups need to be regularly tested to validate their effectiveness in actual recovery scenarios, ensuring that you can restore operations quickly and with minimal business disruption. Without a reliable, tested backup system with established RTOs, the damage from a cyber-attack can be devastating.

As we look ahead, the importance of backup systems cannot be overstated. It's not just a cybersecurity measure—it's an essential part of your organization's continuity plan. You may be thinking about firewalls, detection systems, or encryption, but the most important control—one you might not be focusing on—is ensuring your backups are as strong as your primary defences.

Sponsored by:



Cyber Resilience Starts with ASSURED RECOVERABILITY

Cyberattacks are inevitable. Losing your credibility, reputation, and your members trust doesn't have to be.

Securitas Summa from Fenix24 delivers assured recoverability, combining resistance hardening, ongoing managed protection, and rapid response and no-cost recovery from the world's leading recovery firm.

Recoverability isn't a backup plan—it's the plan.

Ask us about Assured Recovery



SECURITAS SUMMA

Contact Charlie Roberts: Charlie.Roberts@conversantgroup.com
+1.512.653.5916 | fenix24.com/securitas-summa

DAY 3

FRIDAY, AUGUST 15, 2025

Closing Kenote

10:00 - 11:00 AM

Resilience in the Times of Uncertainty

MILTON HUNT, FOUNDER, MILTONHUNT.NET



Resiliency is the ability to overcome stress and challenging circumstances in the workplace. Resilience is increasingly important as more and more people are working remotely. Resiliency is a necessary skill that can be improved over time with the right toolset. When someone is resilient, they are able to respond to change in an effective, and positive manner.

This course will cover the following:

- Define resilience and its importance in a time of uncertainty.
- Describe the emotional roller coaster of change.
- Identify the characteristics enabling resilience.
- Develop resilience in yourself and support its development in others.

Who should attend?

Employees at every level within your organization will benefit from this dynamic training.



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SPONSOR AND EXHIBITOR COMPANY INFORMATION

Acumen Financial Advantage (1622)

Acumen Financial Advantage is the financial performance partner of choice for mission-driven organizations specializing in optimizing programs that attract and retain top talent, increase investment yields, and maximize charitable impact. Our unmatched industry expertise, dedication to superior performance, and consultative, high-touch approach enable us to leverage untapped strategies meticulously designed to outperform industry benchmarks. The result? Bespoke solutions that meet each client's unique, evolving needs and empower them to more efficiently live their mission. Take Your Mission to the Maximum.

www.acumenfa.com

ALM First Executive Benefits (1408)

ALM First Executive Benefits, a wholly-owned subsidiary of ALM First, specializes in executive benefits plan design, consulting, plan audits, and administration services. Committed to meeting the increasing demands of our clients, ALM First Executive Benefits distinguishes itself in the executive benefits arena by prioritizing transparency, trust, and tailored solutions for each client.

avannis.com

American Solutions for Business (1511)

Founded in 1981, American Solutions for Business has grown to serve over 40,000 clients across the world. We are your product and technology partner helping streamline your organization, increase market share, and accomplish your branding goals. From print marketing to branded merchandise, if you're looking for solutions to market and grow your membership, we're your partner! Our sales associates across the country represent thousands of years of experience in professional print and branded product sourcing services. We aim to be an extension of your marketing team and will consult with you to ensure you meet your goals and objectives, all while saving time and money!

www.americanbus.com



Amplifi Loyalty (1421)

ampliFI Loyalty Solutions is an industry-leading loyalty and engagement program provider specializing in data-driven, custom rewards programs for financial institutions nationwide. With over 25 years of experience, ampliFI designs branded loyalty programs tailored to each financial institution's unique needs and offers seamless integration options with existing processing relationships.

ampliFI's innovative platform includes Real-Time Rewards, unique earning and redemption opportunities, enterprise engagement, and dedicated cardholder support. ampliFI empowers clients to customize their programs in alignment with market strategies and provides robust analytics to drive positive ROI. Based in Naperville, IL, ampliFI operates with a PCI-compliant approach and maintains an on-site customer contact center. Notably, ampliFI serves and influences over 10 million cardholders and is the exclusive domestic provider for loyalty programs with Visa

amplifiloyalty.com



AVANA CUSO (1618)

Established in 1998, AVANA CUSO is one of the most seasoned credit union service organizations (CUSO) with a focus on commercial real estate lending. Driving excellence through end-to-end customer service and our investments in technology, AVANA CUSO supports credit unions, including connecting them with commercial real estate entrepreneurs, brokers, and small business owners through participation lending. Our mission is to help credit unions diversify their lending portfolios by expanding their lending programs beyond local communities, mitigating concentration risk while enhancing loan to share ratios. Part of the AVANA Family of Companies, AVANA CUSO strives to improve communities by funding socially responsible projects that boost economic growth and foster job creation. AVANA CUSO is headquartered in Glendale, Arizona.

avanacuso.com



Avannis (1609)

Lack of visibility into what your members are feeling keeps you up at night. With an experience solution built specifically for the credit union, you can listen to members, prospects and employees at every touchpoint, highlighting the most important things to take action on. We help you turn every member experience into opportunity, leveling the playing field with your market's competitors. Avannis has been offering visibility and experience analysis to financial service firms of ANY asset size for 30 years.

avannis.com



SPONSOR AND EXHIBITOR COMPANY INFORMATION

BankJoy

Bankjoy is a digital banking provider partnering with credit unions and community banks to extend their core competitive edge—authentic, community-based relationships—through powerful digital banking solutions. Our comprehensive suite includes mobile and online banking, e-statements, seamless account opening, loan origination, conversational AI, and personal financial management tools. As one of the fastest-growing providers in the market, we enable financial institutions to offer exceptional digital services their customers expect while strengthening the community-centered approach that large institutions simply cannot match.

bankjoy.com

Blastpoint (1520)

BlastPoint is a cutting-edge member intelligence platform designed to empower credit unions with data-driven insights. Our AI-powered solution integrates seamlessly with existing systems by leveraging advanced analytics and predictive modeling, enabling credit unions to enhance lending strategies and Nest Best Product offerings, drive deposits and acquisition, optimize member engagement, and increase growth. Our platform provides actionable intelligence without extensive IT involvement, allowing credit unions of all sizes to make informed decisions.

BlastPoint.com

Compliance Tech (1422)

ComplianceTech is a leader and innovator in providing fair lending, CRA, and HMDA technology solutions to lenders, the federal government, and non-profit organizations. Our ComplianceTech Suite of products, including LendingPatterns™, Fair Lending Magic™, HMDA Ready™, CRA Check™, Fair Servicing™, and Small Business 1071™, along with consulting services, offers the tools necessary to simplify monitoring and managing complex compliance issues in a diverse society. These web-based solutions enable secure, anytime/anywhere access to powerful analytics. Collectively, they deliver the fastest, most comprehensive, and most efficient solution for fair lending risk assessment and monitoring.

compliancetech.com



Cornerstone Resources (1720)

Cornerstone Resources provides executive recruiting and professional staffing services in all 50 states. Whether your credit union is seeking new executive leadership, back office support, or front line staff, Cornerstone Resources has solutions for you.

cornerstoneleague.coop/home



Corporate America Credit Union (1508)

Different Starts Here is our motto – but what exactly does that mean? It means we think differently, act differently and treat our members differently with a common goal – to truly add value to your organization. Founded in 1982 and based in Irondale, Alabama, Corporate America Credit Union is a dedicated, not-for-profit financial cooperative governed by a board of directors elected from and by our member-owner credit unions. With nearly 500 credit unions across the nation we boast a comprehensive list of products and services including investments, liquidity solutions, and correspondent services such as ACH, item processing, and remote deposit capture. Our priority is our members' future success. Let us pay you a visit – we know a partnership with CACU will be beneficial - (800) 292-6242 or visit

corpam.org

Creatio (1518)

Creatio is an AI-native no-code platform that empowers Credit Unions to automate CRM and core workflows with speed and flexibility. By leveraging seamless AI-powered automation, Creatio helps Credit Unions drive member engagement, increase revenue growth, and improve operational efficiency - without the need for complex IT development.

Whether streamlining member onboarding, loan processing, or service inquiries, Creatio enables teams to deliver personalized, human-centric experiences while dramatically reducing manual tasks.

Trusted by Credit Unions worldwide, Creatio is the catalyst for agile transformation, helping credit unions thrive in a competitive, member-first environment.

creatio.com



CU Conferences (1522)

Now in our 46th year, CU Conferences continues to be a leader in credit union education and professional development. Each year, thousands of CEOs, Senior Management, Directors, and Committee Members, from credit unions across the country participate in CU Conferences' programs to learn about the latest in board development, asset management, marketing, operations, staff development, technology and to get the most targeted credit union management training available.

cuconferences.com

CU Evolution (1522)

CU Evolution is a CUSO that began in 2018 with a mission to provide Credit Unions with assets primarily between \$50 million and \$250 million a solution to offer member business loans, 1-4 family investment property loans, lot loans, and interim construction loans to their members and prospects in a financially feasible product. The program allows these credit unions to increase loan interest income, fee income, deposits, and profitability for a fraction of the cost of implanting an in-house commercial and MBL department. CU Evolution fills the expertise requirement by credit union regulators to fulfill these types of loans along with supplying each credit union personalized policies and procedures to fit each credit union's risk profile.

cu-evo.com

Cyberscience Corporation (1621)

Cyberscience delivers powerful business intelligence solutions tailored for credit unions seeking to excel in today's dynamic financial landscape. Our flagship platform, Cyberquery, transforms complex data into clear, actionable insights—empowering your leadership team to make faster, smarter decisions that enhance member service, ensure regulatory compliance, and drive operational efficiency.

With decades of experience serving financial institutions, Cyberscience understands the unique challenges credit unions face. Our intuitive reporting and analytics tools allow real-time monitoring of key performance metrics, risk exposure, and member trends—without the need for specialized IT resources.

Connect with us at the conference to discover how Cyberscience can help your credit union unlock deeper data-driven value, streamline compliance, and deliver exceptional member experiences. Visit our booth (#1621) to learn why leading credit unions trust us as their strategic intelligence partner. Let's advance your mission together.

cyberscience.com



Earnest Consulting Group (1624)

Earnest Consulting Group works with credit union boards and senior management to:

- Build strategies to reward and retain key executives through Executive Benefits
- Provide investment solutions to offset employee benefit costs
- Enhance the credit union's charitable giving opportunities

earnestconsulting.com



Econocheck Corporation (1519)

Econocheck delivers bottom-line benefits to financial institutions by strengthening account-holder relationships and providing new fee income streams. Since 1973, thousands of financial institutions have profited from Econocheck's data-driven retail checking strategies, direct response insurance programs, and identity protection services. Our customized solutions offer the enhanced services valued most by consumers and businesses — identity & data security, cell phone protection, credit monitoring, entertainment discounts, health savings, and financial management tools — while providing our partners with recurring revenue and measurable gains in customer retention. Listening, delivering, partnering, growing — the Econocheck way for the last 50 years.

econocheck.com



ECU Technology (1509)

eCU Technology is a leading financial service technology company and Credit Union Service Organization (CUSO) based in Houston, Texas. Founded in 2015, eCU specializes in innovative account opening and loan origination solutions designed specifically for credit unions and banks. Their flagship ORIGINS® Platform streamlines digital onboarding, enhances new account growth, increases both deposit and loan volume, and delivers a customizable, user-centric experience. With robust automation, seamless integrations, and flexible workflows, eCU Technology empowers organizations to boost efficiency, scale operations, and provide members with a powerful, intuitive digital experience.

ecutechnology.com



Elan Credit Card (1722)

Elan partners with credit unions through our turnkey credit card issuing solution, mortgage solutions, and all-in-one merchant processing platform, talech®. Our dedication to our partners, growth philosophy, and investment in technology has made us a leader in the industry since 1968. Our approach offers expertise while removing costs, reducing risks, and improving the cardmember experience. Learn more about our innovative solutions for consumer and business accounts of all sizes.



Eleos Life (1425)

Eleos Life (www.eleoslife.com) helps businesses offer their customers protection against life's biggest financial shocks - like losing the ability to earn, serious illness, or the death of a loved one. We help people stay financially resilient when the unexpected happens, through accessible co-branded or white-labelled insurance options like term life and disability cover. Eleos Life partners with trusted platforms - like credit unions - to embed this protection directly into everyday digital journeys. There's no licensing headache, zero cost to go live, and full marketing support - so their members get essential cover, and they unlock a new revenue stream. The experience is fully digital, powered by AI-assisted journeys, and comes with bundled wellness perks - making protection simple, engaging, and built for a new generation.



Extole (1423)

Extole helps credit unions fight rising paid media costs by turning your members into a powerful channel for acquisition, awareness, and activation. As a trusted partner to many credit unions, our enterprise advocacy platform makes it easy to build customized referral and advocate programs that engage existing members and attract new ones, all while generating a valuable, proprietary source of first-party data. Extole's advanced capabilities—including audience segmentation, personalization, A/B testing, fraud prevention, and mobile SDK—ensure credit unions get measurable results from their referral strategies.

extole.com



Fenix24 (1625)

Fenix24 Redefines Cyber Resilience.

Fenix24 is recognized as the leading breach recovery company in the world, and combines that unique expertise with prevention, protection and a recovery guarantee that together delivers the most comprehensive cyber resilience program available today.

Cyber resilience is more than just resistance to cyber-attacks. Fenix24 Securitas Summa program offers our clients something truly unique: an assurance of recoverability. Combining ongoing managed protection and real-time threat intelligence, program hardening and breach resistance, and an Incident Response Retainer from the world's leading recovery firm, Fenix24, Securitas Summa ensures your organization is prepared for and can recover from cyber-attacks.

fenix24.com



FI Navigator (1410)

FI Navigator provides a U.S. banking vertical data and analytics platform to industry vendors & consultants and the financial institutions they serve.



Financial Supermarkets (1512)

Financial Supermarkets, Inc. (FSI) is the nation's leader for attractive, functional, and professionally designed in-store, on-site, and storefront financial centers. For over 40 years financial institutions of all sizes partner with FSI to efficiently expand their branch network while maximizing touch-points with their customers/members.

supermarketbank.com



Gallagher Benefit Services (1724)

Gallagher's Executive Benefits Team consults with credit unions to provide solutions to recruit, reward, and retain their executive leadership. We specialize in nonqualified benefits for credit unions, such as Split Dollar, 457(f), bonus, and incentive plans. Gallagher helps you secure your organization's future through succession planning, executive retention strategies, and compensation consulting. With more than 25 years of experience, our team is well-versed in the custom design, implementation, and administration of all types of executive benefit plans, utilizing a range of funding and cost offset strategies. We produce the annual Gallagher Executive Compensation and Benefits Survey as a resource for both Boards and executives to benchmark their total rewards offering. Headquartered in Charlotte, North Carolina, our coast-to-coast service helps ensure complete coverage across all time zones.

www.ajg.com



Glia (1523)

Glia is the leading AI customer interactions solution for credit unions, unifying AI and human CSRs across all voice and digital channels. With our proprietary ChannelLess® Architecture and AI for All™, we help credit unions automate interactions and boost agent performance so they can eliminate the efficiency vs. experience tradeoff. Glia has been named a Deloitte Technology Fast 500™ company for five consecutive years and boasts an industry-leading 73 NPS score.

Learn more at glia.com



Housetable (1411)

Housetable offers an AI-powered digital portal that enables credit unions to launch or scale renovation and construction loan programs - no in-house expertise required. The platform automates valuations, project risk analysis, contractor vetting, and draw management, reducing processing time by up to 10x. With borrower, contractor, and credit union portals, members access larger, faster funding for home upgrades—critical in today's tight housing market.

housetable.com



Inlighten (1718)

inLighten is the leading provider of digital signage solutions for the credit unions. Servicing the financial industry since 1989 and currently supports over 2,500 financial institutions in over 15,000 retail branches and corporate facilities in all 50 states, throughout Canada and in a variety of international locations all of which engage their audiences with inLightens products each day. inLighten's solutions include traditional and interactive digital signage, video walls, self-service kiosks and tablets, on-hold and environment audio, check-in and queuing systems and more. inLighten's intuitive, cloud-based management system enables creation, scheduling and distribution of dynamic content from inLighten's hosted network.

inlighten.net



Invo Solutions (1419)

Invo enables secure, face-to-face interactions between people and their financial institutions — whether in the branch, at home, or on the go. These interactions are powered by Invo's first-to-market video banking platform, which reduces lobby wait times by over 50% and enables 4-to-1 FTE ratios at community financial institutions nationwide. In addition to video banking, Invo offers tools like SMS texting, lobby management, appointment scheduling, co-browsing, and chatbots — bringing human warmth to every click, tap, and conversation.

invosolutions.com



Kasasa (1610)

Kasasa is a financial technology provider committed to driving real growth for community banks and credit unions to help them recapture market share. Since 2003, their branded and private retail products, world-class marketing, and expert consulting services have helped their clients attract, engage, and retain consumers nationwide. Today over 600 community banks and credit unions rely on Kasasa to manage over \$20B of core deposits — and their combined network of community financial institutions represents the 4th largest branch banking network in the country.

www.kasasa.com



KellMoore & Associates (1513)

We help organizations design executive benefit packages, director benefits, and supplemental retirement plans that are consistent with the company's strategic goals. We take the time to get to know our clients and develop customized solutions that clearly demonstrate the benefits of our recommendations. By utilizing carefully selected funding vehicles, we help clients recover the costs of their programs and minimize the financial impact on the organization.

kellmoore.com



Lucky Soap (1418)

Lucky Soap – an extraordinary experience where delightfully handcrafted soaps, bath bombs, and sugar body scrubs smell as delicious as they look! Each one of our bakery-inspired bath and body treats is handmade by some of the most amazing artisan soap makers on the planet.

luckysoaplv.com



Marquis (1521)

Dedicated. Driven. Determined to excel. Marquis has a passion for performance and plays to win for over 700 banks and credit unions nationwide. We are experts in marketing and compliance customer data platforms (CDP) software, analytics, and solutions. We offer various products, including CRM, journey orchestration, conversational analytics, strategic consulting, cloud services, website design, and digital communication tools, all designed to give clients every advantage.

gomarquis.com



MSC Security (1620)

MSC Security is a Cybersecurity and IT Managed Services firm dedicated to serving organizations of all sizes. As technology advances and the digital realm expands, so do the risks associated with data breaches, ransomware attacks, and other malicious activities. Our mission is to empower businesses and consumers worldwide, providing them with the tools, expertise, and peace of mind necessary to navigate the digital domain with confidence. With our relentless commitment to privacy and data protection, we deliver cutting-edge security solutions tailored to meet the unique challenges faced by organizations today.

mscsecurity.io



myCUMortgage (1613)

As a mortgage CUSO, myCUMortgage will provide scalability to help your credit union stay in front of changing market conditions and member expectations for mortgage originations, secondary market funding and loan servicing. Through our partnership, we will provide the options of full-service retail origination, wholesale or correspondent lending channels. Count on customized solutions with access to our digital marketing and member retention systems, mortgage origination technology, and myCUMortgage experts for training, marketing, originations, processing, underwriting, servicing and secondary market access.

Plus, you have the flexibility to incorporate your portfolio loans or choose to retain servicing. We partner with credit unions nationwide to empower credit unions to become GREAT mortgage lenders! For scalable solutions, reach out to our Credit Union Development Managers Dawn Rudie and Denise Stewart at sales@mycumortgage.com or visit www.mycumortgage.com.

Let's talk! Equal Housing Opportunity. NMLS# 565434.

mycumortgage.com



Ned (1525)

Ned's platform illuminates business performance throughout the lending lifecycle, offering transparency and automation where lenders typically struggle with limited visibility into cash flow. For businesses with strong fundamentals but lacking traditional credit, collateral, or facing difficulties in proving creditworthiness, Ned provides a solution that enables lenders to confidently extend financing. From top-of-funnel prospects through servicing a full suite of fixed and revenue-based loans, Ned's white label rail integrates cash flow transparency so lenders can offer tailor-made capital products, underwrite, and size loans with customizable cash flow scoring, and then manage against default during repayment.



Newcleus (1713)

Newcleus, based in Yardley, PA, is one of the foremost experts in institutional insurance investment, benefits and compensation strategies, trusted to help design, implement and manage non-qualified and qualified portfolios in ways proven to outperform what's historically been possible. With a nationwide team of over 30 advisors, Newcleus is known for bringing new ideas to the table, illuminating new ways to generate greater income, savings and talent loyalty for their 750+ clients and \$12 billion under management.

The Newcleus logo features the word "newcleus" in a lowercase, sans-serif font. The "n" is dark blue, and the "e" is a lighter blue, while the rest of the letters are dark blue.

Credit Unions specifically turn to Newcleus for their CUOLI, LINQS+ and Non-qualified Deferred Compensation strategies to help attract and retain their top performers, offset increasing benefit plan expenses and provide incremental revenue streams that outperform traditional investments. Unlike other companies, Newcleus is fully independent, not restricted to any one product, carrier, plan or solution and specializes exclusively in institutional insurance investment, benefits and compensation strategies. That ensures their unique ability to deliver a wider array of holistic, agnostic thinking and options for their clients.

newcleus.com

Open Lending (1619)

Open Lending is a pioneer in fair lending, and changes lives by making loans more affordable and accessible to underserved communities. From AI-powered decisioning to providing third-party default insurance, Open Lending offers end-to-end lending enablement services truly expand auto lenders' ability to give automobile access to more deserving borrowers.

The OpenLending logo features the word "OpenLending" in a sans-serif font. "Open" is in blue and "Lending" is in green.

As an expert on near-prime borrowers and automotive, Open Lending offers third-party loss protection on riskier profiles with the automobile asset being borrowed in mind. decision technology for automotive lenders throughout the United States. It's proprietary program, Lenders Protection™ uses AI-powered actuarial and federated data from the company's >\$19.2B in automotive loans to provide a score PLUS an approved or countered loan structure, a risk adjusted price and default insurance.

openlending.com

Salus FinTech (1420)

Salus is a digital platform helping credit unions turn Gen Z into members for life. Salus Microloans powers digital, automated microloans that help members in need without relying on credit score. Salus Sentinel leverages AI to give credit unions actionable insights on struggling members, improving member experience and loan collections.

The Salus logo features the word "salus" in a lowercase, sans-serif font. The "s" is dark blue, and the "a" is a lighter blue, while the rest of the letters are dark blue.

Shanley Search Partners (1623)

Shanley Search is a nationwide financial services consulting and strategic advisory firm that specializes in Executive Search, Recruitment and Leadership Development for Credit Unions, Banking and Fintech. We put our experience to work for you successfully placing top performing candidates from managers to executives and C-Level. We have extensive experience working with Boards on the executive placement of their next CEO and can also help with both retained and contingency search, internal candidate evaluations, direct placement, project staffing, and contract-to-hire scenarios. We Find the Perfect Fit!

shanleysearch.com

The Shanley Search Partners logo features the words "Shanley Search" in a sans-serif font, with "PARTNERS" in a smaller font below it.

The Sheeter Group (1709)

The Sheeter Group consults exclusively with credit unions on executive benefits and compensation. We design and service executive benefits that meet your retention and succession needs, while aligning performance with strategic objectives. Our compensation advisory services prepare you to confidently compete and thrive in today's complex market. As an independently owned firm, we act on our client's best interests with regulator-friendly solutions that maximum the return to the credit union and the benefit to the participant.

Learn more at www.sheetergroup.com

The The Sheeter Group logo features a stylized green tree icon above the words "THE SHEETER GROUP" in a sans-serif font.

Stearns Financial Group (1413)

Leverage our expertise to drive yield, supplement retirement, and optimize retention and succession. With over 25 years specializing in executive retention and retirement plans for credit unions, Stearns Financial has the expertise to design, implement, and administer every type of executive benefit program.

Our plans are different because we use process as the driver to achieve effective design. By starting with your organization's mission, goals, and intent we tailor individually for each executive. We are unique in that we can often accomplish this with no accounting cost to the organization, favorable reporting, and tax-free withdrawals.

stearns.financial

The Stearns Financial Group logo features the letters "SFG" in a stylized font above the words "STEARNS FINANCIAL GROUP" in a sans-serif font.

Staywood Design (1708)

Staywood is an architectural design-build firm that specializes in financial institutions. We focus on operational functionality, retail design, and finding an architectural identity that maximizes your brand. Our team knows the right questions to ask so we design better for our clients.

staywood.com



StoneCastle (1711)

StoneCastle provides funding (to low-income designated credit unions) and liquidity management solutions to all credit unions. Our services help credit unions retain their members and attract new ones. To support large depositors, StoneCastle has a solution that offers extended federal insurance protection up to \$100 million.

stonecastle.com



Stukent (1524)

Build financial literacy in your community while building your brand! By sponsoring the Stukent Personal Finance Curriculum, our white-label simulation, you can put powerful, engaging financial literacy tools into local students' hands.

stukent.com



Total Merchant Concepts (TMC) (1412)

Total Merchant Concepts (TMC) has a passion for partnering with credit unions across the U.S.—a commitment we've honored for over 25 years. We help credit unions grow their business memberships, increase deposits, and deepen member relationships. TMC provides integrity-based solutions that help our clients reduce frustration, increase their bottom line, and enhance their passion for being in business. Through ongoing leadership coaching, team training, and practical business tools including merchant services, we empower leaders to build strong cultures and develop top talent. Whether driving business growth or enhancing leadership capacity, TMC is dedicated to helping credit unions and their business members succeed.



TruStage (1409)

TruStage is a financially strong insurance, investment and technology provider, built on the philosophy of people helping people. We believe a brighter financial future should be accessible to everyone, and our products and solutions help people confidently make financial decisions that work for them at every stage of life. With a culture rooted and focused on creating a more equitable society and financial system, we are deeply committed to giving back to our communities to improve the lives of those we serve.

For more information, visit trustage.com



United Solutions Company (1510)

United Solutions Company is a Credit Union Service Organization (CUSO) and Application Service Provider (ASP) founded in 1983 with headquarters in Tallahassee, Florida. United Solutions provides a comprehensive menu of products and services to credit unions and other businesses all over the country. From core data processing and check 21 services, to collections and network management, our exceptional services and commitment to innovation is what truly sets us apart.

Visit www.unitedsolutions.coop for more information.



Tyfone

Based in Portland, Ore., Tyfone, Inc. is the creator of nFinia®, a dramatically better retail/commercial digital banking platform, as well as several platform-agnostic, revenue-generating digital business solutions for credit unions and community banks. Our highly configurable platform, broad array of business solutions, and ecosystem of third-party partners ensure our entire suite is scalable and extensible to meet the needs of any community financial institution. What truly sets us apart is our commitment to our people and our dedication to continuous customer engagement. While every vendor builds features not every vendor builds relationships. At Tyfone we specialize in building both and strive to deliver on this promise every day. Additional information is available at tyfone.com.



Velera (1611)

Velera is the nation's premier payments credit union service organization (CUSO) and an integrated financial technology solutions provider. With over four decades of industry experience and a commitment to service excellence and innovation, our company serves more than 4,000 financial institutions throughout North America, operating with velocity to help our clients keep pace with the rapid momentum of change and fuel growth in the new era of financial services. Velera leverages its expertise and resources on behalf of credit unions and their members, offering an end-to-end product portfolio.

www.velera.com

Vizo Financial (1710)

Vizo Financial Corporate Credit Union is a cooperative built by credit unions. We're a state-chartered corporate credit union and a provider of back-office solutions in the areas of money management, payments, core processing and education. We're a forward-thinking organization that places a strong emphasis on innovation, strategy and building connections.

But, even more than that, we're allies for the CUSOs, leagues, chapters and 1,100+ credit unions in the U.S. and Canada that we serve. Beyond the services and the transactions, our mission is to drive credit union success through proven EXCELLENCE, unmatched EXPERTISE and engaged PARTNERSHIPS.

We've found that the secret to our success is recognizing that we are all one in the same. With the same last name – credit union – we can put collaboration first and help each other achieve a common goal... financial wellbeing for all.

For more information about Vizo Financial, please visit www.vfccu.org

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Introducing Vertice AI, our new
AI-enabled Member Growth Engine.

Benefits of the Solution:

- 70+ metrics to understand individual and holistic membership
- Economic participation scoring and leveling proprietary to the solution
- Personalized product recommendations for members based on common journeys
- Track economic participation over time as growth opportunities are executed
- Quickly filter, slice and report from prebuilt and configurable dashboards
- Behavior-based analytics for member location, transactions and balances

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